



PowerSchool Special Programs Office Hours: Utilities

Tips for Case Management/Transfers

<Date>



In this session we will

Take the time to learn/focus on two functions in Utilities:

- Case Management (Post-Migration)
- Transfers (Pre-/Post-Migration)



Zoom Meeting Norms

- Make sure that your audio is on mute during the presentation to limit background noise.
- If you have question that will benefit the entire group please ask. Those specific to your database please keep until we meet with you.
- Monitor your airtime both in the main room and breakout rooms. We have a limited amount of time and are trying to see as many clients as possible.
- Remember the goal of the Office Hours is to complete the tasks for the Topic of the Day and not every item on the audit.

Administration > Utilities

Data Utilities: Students

Select Utility:

▼

Data Utilities

- Replace Student Fields
- Deactivate Student Profiles
- Delete Student Profiles
- Reactivate Student Profiles
- Restore Student Profile from Backup Database
- Merge Student Profiles
- Create Documents in Bulk
- Convert File-Based Documents

Student Transfer Utilities

- Send Student Transfer Envelope
- Receive Student Transfer Envelope

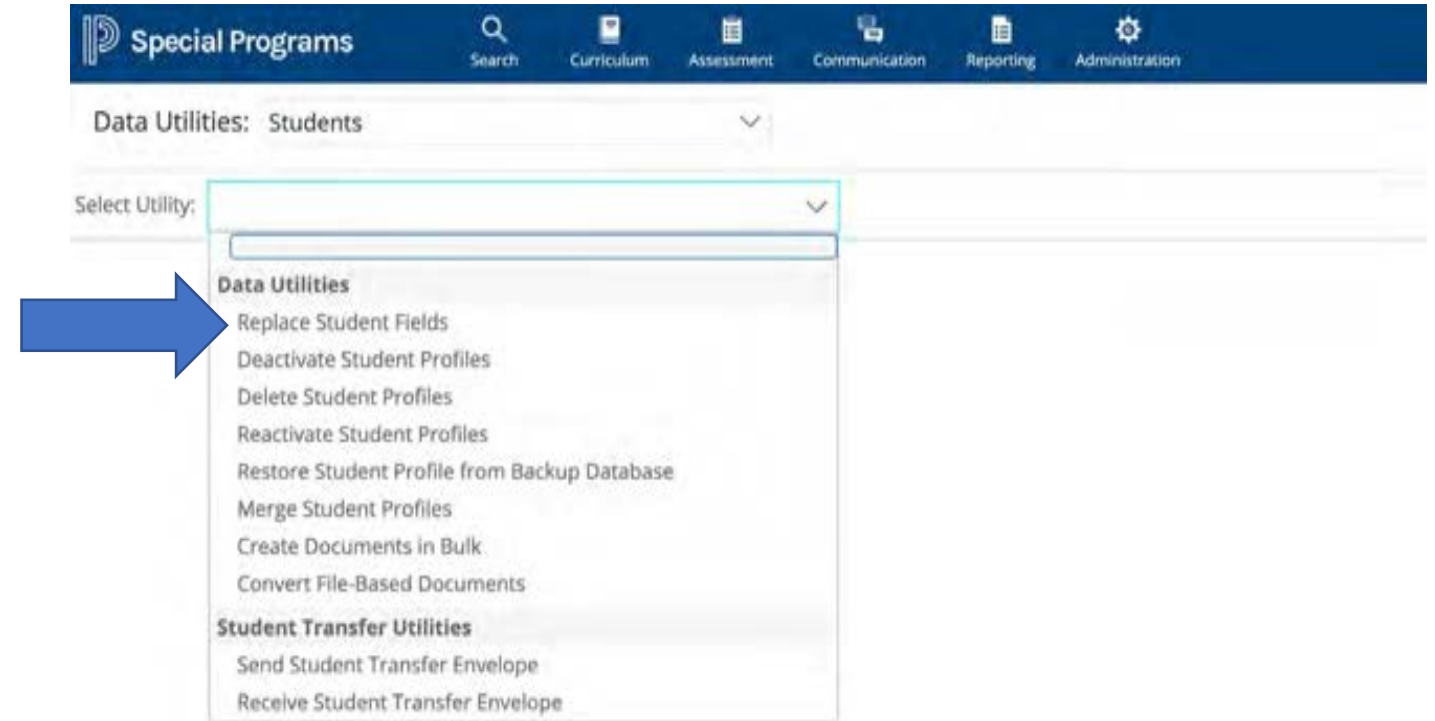
Utilities allows you to:

- ✓ Replace student fields
- ✓ Deactivate student profiles
- ✓ Send student transfer envelopes
- ✓ Receive Student Transfer Envelopes

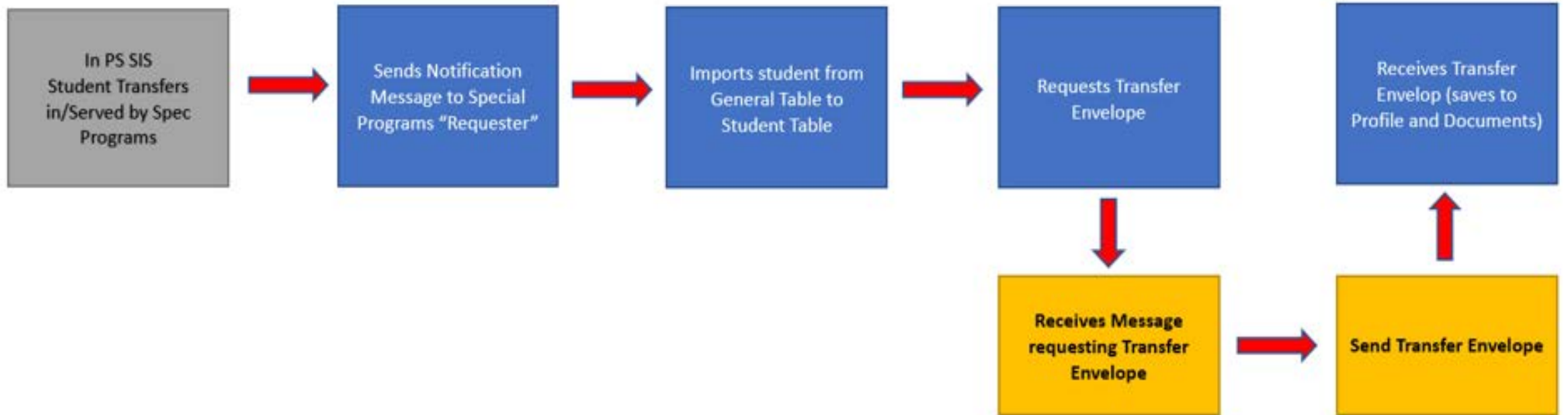
And that's just a few of the functions in Utilities!

Administration > Utilities > Replace Student Fields

Let's take a look at managing a caseload by mass assigning a case manager.



The Transfer Notification Process in Alabama



Administration > Utilities > Transfers

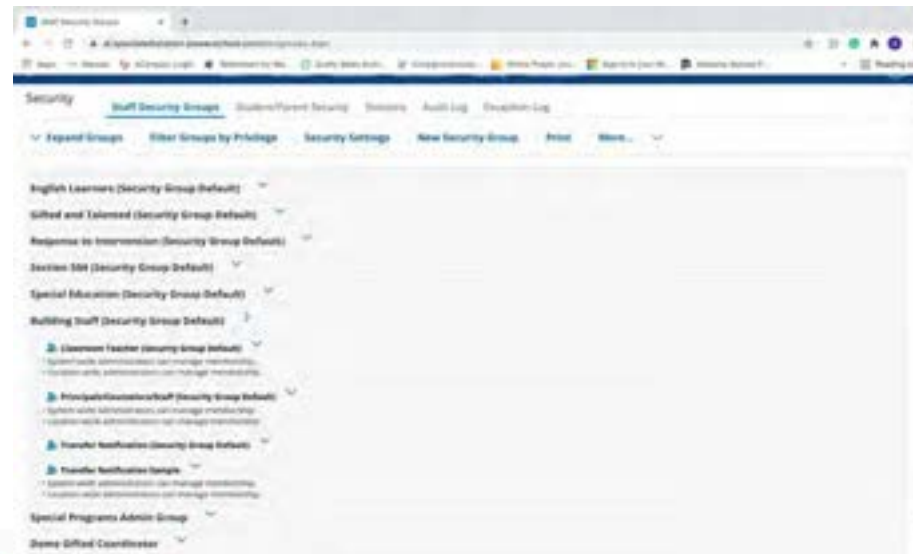
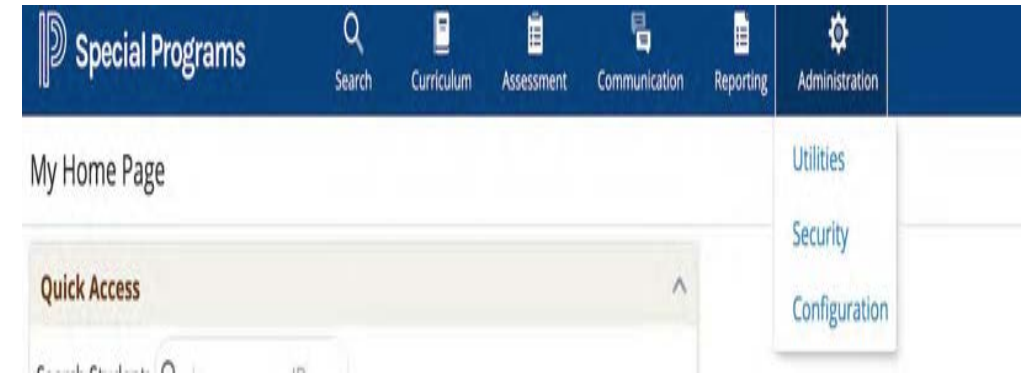
The screenshot shows the 'Special Programs' administration interface. At the top, there is a navigation bar with icons for Search, Curriculum, Assessment, Communication, Reporting, and Administration. Below this, the breadcrumb path 'Data Utilities: Students' is visible. A dropdown menu is open, showing a list of utilities. The list is divided into two sections: 'Data Utilities' and 'Student Transfer Utilities'. The 'Student Transfer Utilities' section is highlighted with a blue arrow pointing to the 'Send Student Transfer Envelope' option.

- Data Utilities**
 - Replace Student Fields
 - Deactivate Student Profiles
 - Delete Student Profiles
 - Reactivate Student Profiles
 - Restore Student Profile from Backup Database
 - Merge Student Profiles
 - Create Documents in Bulk
 - Convert File-Based Documents
- Student Transfer Utilities**
 - Send Student Transfer Envelope
 - Receive Student Transfer Envelope

There is a process to Send and Receive Transfer Packages in Special Programs. A Requestor/Receiver needs to be added as a member to your Transfers group.

Administration > Security

- Select Administration > Security
- Select Transfer Notification Security Group from the Drop-down Menu



Select Document Templates

The screenshot shows a web browser window with the URL `al.specialeducation.powerschool.com/sicgroupprops.aspx?group=73&posy=291&expand=73`. The page title is "Transfer Notification Sample" and the breadcrumb is "Staff Security Groups > Transfer Notification Sample". The navigation menu includes "Properties/Privileges", "Members", and "Document Templates". The "Properties/Privileges" tab is active, showing "Edit Properties/Privileges" and "More...".

Transfer Notification Sample - Properties/Privileges

- System-wide administrators can manage membership.
- Location-wide administrators can manage membership.

Privilege Set	(+) Granted (-) Denied	
Special Access	(+) Access My Caseload	(+) Edit My Standard Caseload
Reports	(+) Create Private Standard Reports	(+) View Advanced Reports
	(+) View Public Standard Reports	(+) Share Private Reports
System Administration	(+) View Staff Personal Calendars (Location-Wide)	
Field Level Security Privileges	(+) View Sensitive Fields	
Students Profiles & Documents	(+) View Students (Location-Wide)	(+) View Related Services (Location-Wide)
	(+) Access Documents (Location-Wide)	(+) View Assistive Technology (Location-Wide)
	(+) Access Events (Location-Wide)	(+) View Gifted Aptitude Tests (Location-Wide)
	(+) Create Edit Own Events (Location-Wide)	(+) View Support for Personnel (Location-Wide)
	(+) View Supplementary Services (Location-Wide)	(+) View Document Delivery (Location-Wide)
	(+) View Special Education Services (Location-Wide)	(+) View Contact Log (Location-Wide)
	(+) View Program Modifications (Location-Wide)	(+) Add Contact Log (Location-Wide)
	(+) View Access (Location-Wide)	(+) Edit Contact Log (Location-Wide)
	(+) View Accommodations Assessments (Location-Wide)	(+) View Student Contacts (Location-Wide)
		(+) Access Documents

Add View Only Privileges to Documents

- Click on the Magnifying Glass for the document that you would like to add view only privileges for
- Select Edit > Check the box next to View > Save

Transfer Notification Sample - Template/Category Rights Summary

Document Templates/Categories	View/Edit Rights							Status Change Rights					Submit to DocuSign		
	View	View Only	View If Owner Create	Edit Draft	Edit Review	Edit Final	Translate	Delete	Set Draft	Set Review	Set Final	Set Active		Print	Review Acknowledge
Referral Process															
Early Intervention to Preschool Transition Plan															

Transfer Notification Sample - Template Rights for 'Individualized Education Program'

Document-Wide Rights	Document-Wide View/Edit Rights							Status Change Rights					Attach					
	View	View Final Only	Create	Edit Draft	Edit Review	Edit Final	Translate	Delete	Set Draft	Set Review	Set Final	Print	Review Acknowledge	Submit to DocuSign	Attach Files by Others	Edit Files Attached to Documents	Edit Public Final Statement Banks	Fin
Document-Wide Rights	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p>These rights can alternatively be assigned for individual sections</p> <p>Section-Wide View/Edit Rights</p> <p>Section Name View Edit Draft Edit Review Edit Final Translate</p>																		

****For Transfer Notification Group****

Adding Members

Staff Security Groups > Transfer Notification Sample ▼

Properties/Privileges Members Document Templates

Filter by: (None) ▼

Add Members |

Transfer Notification Sample - Members

No members to display.

Adding Members

- Look up faculty that you would like to add to the Transfer Security Group and select them.
- Save the selected Faculty Members.

Transfer Notification Sample > Members > Add Members

Quick Search Advanced Search

Staff Quick Search Form

Enter one or more fields and click the 'Search' button to find Staff with the same field information.

ID	<input type="text" value="Transfer1"/>	
Last Name	<input type="text"/>	
First Name	<input type="text"/>	
Works At	<input type="text"/>	(ID) lookup
Alternate Staff Locations	<input type="text"/>	(ID) lookup
Caseload	<input type="text"/>	(ID) lookup
		<input type="button" value="Search"/> <input type="button" value="Clear"/>

Transfer Notification Sample > Members > Add Members Using: Quick Search | Advanced Search > Results

Add Staff Marked Below To 'Transfer Notification Sample'

ID	Last Name	First Name	Works At	User Open ID[Admin]	User Open ID[Teacher]	User SSO ID	Prior Staff ID	Login (Temp Password)
<input checked="" type="checkbox"/>	TRANSFER1	Requestor	Transfer					Activated

Add Staff Marked Above to Transfer Notification Sample

Critical Pre-Migration Tasks

- Add members to your transfer group
- Modify Document Templates so that they are “VIEW ONLY” for transfer notification group

Risk: if you do not complete the tasks, you will delay migration

Benefit: when you complete tasks on time, you will receive your migration date

Administration > Utilities

Resources:

- [Configuration, Basic Settings, Integration Overview](#)
- [Administrative Utilities Deep Dive](#)

Thank
you